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24 JAN 1962

BRIEF FOR THE CIA CAREER COUNCIL

SUBJECT: Fitness Reporting

I. BACKGROUND

Statutory exemption from the Performance Rating Act of 1950 permits the Agency to develop and establish its own employee rating system. Various kinds of fitness reporting systems have been used by the Agency in the past (Tab A). Under the leadership of the Career Council, a great deal of co-ordinated effort and careful consideration have gone into the development, installation, and improvement of these systems. Fitness Report, Form 45, currently in use, was developed during 1958 by a Task Force of Senior officials from all parts of the Agency. After approval by the Career Council it was put into effect on January 1, 1959. This report is largely a combination of those parts of previous Fitness Report Forms which, in the opinion of the Task Force, had proven most useful and acceptable for employee evaluation purposes.

II. EVALUATION OF CURRENT REPORTING SYSTEM

Fitness Report evaluations are used extensively in selecting personnel for assignment, for competitive promotion and for training. They are also used in determining nominations of individuals for selection-out and in ranking personnel on relative retention lists for surplus categories of personnel. The maintenance of Fitness Report records on a current basis requires constant follow-up on the part of management. Slowness in submitting reports has been attributed in some part to a lack of satisfaction of supervisors with the reporting system and the report currently in use.

The Career Council at its 65th Meeting on 25 May 1961 directed that a report on the fitness reporting system be prepared including tabulations illustrating significant deviations in standards and practices. In view of this an examination of a large group of Fitness Reports was made. Also a review was completed on comments and suggestions on Fitness Reporting which were received voluntarily and upon solicitation from operating officials, Career Service representatives, personnel officers and employees.

This study revealed that the current fitness reporting system has been satisfactory. However, it is considered desirable at this time to make further improvements by simplifying and clarifying the rating standards and making other changes in the fitness report form and reporting system. The problem areas are highlighted in the proposed summary together with their proposed solutions.

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PROBLEM

1. The current Fitness Report, Form 45, provides in Section B for rating specific duty performance on a 7 point scale set up in equal intervals from "1-Unsatisfactory" to "7-Outstanding". It also provides for an overall rating, in Section C, on a six point scale of equal intervals, each letter described in sentence form. This difference in scale value was intentionally designed to avoid attempts to average the ratings on specific duties to derive the overall rating. Such averaging would not give weight to good or bad performance on single duties according to their relative importance. This result has not been achieved.
2. Rating of Personal Characteristics (Section D, Form 45). Our experience has indicated that the results are of doubtful validity and that users of the ratings have not found it useful.
3. There have been indications of inadequate participation by Reviewing Officials. This has been exemplified by failure to document agreement or disagreement with ratings and, on some occasions, Reviewing Officials indicate disagreement without explanation.
4. There is no space provided on the current Fitness Report, Form 45, for a person to show he has attached to the form a memorandum regarding any part of his rating.
5. The current form does not place sufficient emphasis on the rating of managerial and supervisory responsibilities.

SOLUTION

1. The proposed revision of the form provides for rating both specific duties and overall performance on a 5-point scale with adjectives describing each level. The intervals on the scale are not even: Only one rating level is assigned to less-than-satisfactory performance but four levels are provided for discriminating among degrees from Satisfactory (Adequate) to Outstanding.
2. Eliminate this manner of evaluation of personal characteristics and make provision in other parts of the report for such evaluation. A low or high evaluation of a personal characteristic is better handled through a comment in the narrative section of the report.
3. Eliminate the opportunity in current Fitness Report, Form 45, for Reviewing Officials to merely check a box on the form to indicate their evaluation of the individual. Additional space is provided on the proposed form for the Reviewing Officials to enter their comments. Proposed instructions for the new fitness report form describe aspects of the ratings on which the Reviewing Official might desire to comment.
4. Provision has been made on the proposed Fitness Report Form and in the instructions for the individual to indicate that he has attached a memorandum regarding his rating should he so desire.
5. The revised form and the instructions give greater stress to this requirement.

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III. CONCLUSIONS

Improvements in the Agency Fitness Reporting System are advisable at this time:

- a. The proposed changes in the Fitness Reporting System and the revised form will provide more useful information to meet Agency personnel management requirements.
- b. Improved instructions to accompany the Fitness Report Form will be valuable in introducing the revised form.
- c. Short training courses for supervisors, personnel or administrative personnel should be conducted at the time the form is put into effect.

IV. RECOMMENDATIONS

- a. Form 45, Fitness Report, be revised in accordance with sample proposed in TAB B-6.
- b. Directions for preparing Fitness Report, Form 45, Revised, be approved for publication (TAB B-7).
- c. An All Employee Notice be published to announce the inauguration of the new reporting system and form, TAB C.

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FITNESS REPORT FORMS

1949 through 1961

<u>Date Used</u>	<u>Form Number and Title</u>	<u>Purpose</u>	<u>Tab</u>
1949 - 52	Report of Efficiency Rating, Civil Service Form 51	Efficiency Rating Form for Headquarters Personnel	A-1
	Status and Efficiency Report, Agency Form 51-53	Fitness, Qualification, and Assignment Preference Report for Field Personnel	A-2
Aug 52 Sep 54	Personnel Evaluation Report, Form 37-151	Fitness Report and Career Planning Document - All Personnel	A-3
Mar 54 Dec 55	Career Selection Report Form 37-189	Fitness Report and To Provide Information in Connection with Selection of Employee into the Career Staff	A-4
	Fitness Report Form 45 (1-55)	Same	A-5
Jan 56 Dec 58	Fitness Report (Two Part Form) Form 45 (11-55)	Fitness Report on Performance Combined with Analysis of Potential. Latter Part of Form Not Shown to Employee	A-6
Jan 59 to Present	Fitness Report Form 45 (8-58)	Current Fitness Report Form	A-7

NOTE: Copies of the above forms are available in Plans Staff, 262 Curie, if desired. Because of bulk, they have not been attached as tabs to this study.

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TAB B

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